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Proactive Learning

By Jennifer J. Salopek

Clarkston consultants are encouraged to seek out their own professional development to become trusted advisers to their clients.

Clarkston Consulting, a management and technology consulting firm that specializes in the life sciences and consumer products industries, employs a highly mobile workforce of about 200 professionals. That geographic diversity is a key audience factor addressed by the firm's professional development team, which reports to Carol Gillespie, managing partner for human resources. "We are challenged to be creative in our programs and how we get information out to our consultants," she says.

The firm was an early adopter of social learning technologies. Its intranet portal, CLARK (Collaborate, Learn, and Reuse Knowledge), was launched in 2008. Built on a SharePoint platform, CLARK is much more than a portal for sharing company information and pushing organizational announcements; it is a true knowledge repository. It allows employees to collaborate across projects, share best practices, and learn from one another.

"The portal has a very large scope," says Irene Lewis, learning and knowledge sharing manager. "We did encounter the question of how to ensure quality over

quantity." The firm adopts a system of "stewards," subject matter experts who bear responsibility for their areas or communities. Not only do the stewards moderate posts and respond to questions; they also can create their own learning materials and webinars, and facilitate coaching and mentoring within the communities.

CLARK also is used to promote learning initiatives, facilitate podcasts and blogs, and encourage webinar participation. Employees can set up RSS feeds to synchronize information from different online platforms into a centralized repository for easy access and sharing.

Continuous learning is a part of the culture at Clarkston, according to Gillespie, who notes that an internal tag line asks rhetorically, "How will you be sought after?" Consultants are motivated by learning and want to be sought out as experts. New employees attend a three-day orientation program that includes a knowledge-sharing presentation on how to use and contribute to CLARK.

Lewis and one other staff member are responsible for the professional

development offerings at Clarkston, which include various initiatives targeted at key populations. Headcount at the firm grows by about 10 percent per year, with a commitment made to hiring several new college graduates.

The New Associate Bootcamp program was designed for this population, six to 12 of whom are selected to attend each summer. This eight-week, intensive program builds the consulting, technical, and leadership skills essential to success at the firm. Its development, delivery, and support are a companywide effort involving more than 45 people.

Ten of those are executives; support for professional development at Clarkston starts at the top. Every executive has responsibility for developing employees in their performance goals, and more than three-quarters participate in learning events as instructors or speakers.

"We have a genuine commitment to learning," says CEO Tom Finegan, to whom Gillespie reports. "We invest significantly in training and professional development and expect our people to take advantage of that investment."

“We are challenged to be creative in our programs and how we get information out to our consultants.”

—Carol Gillespie, Managing Partner for Human Resources, Clarkston Consulting

The firm spends more than \$2,500 per employee each year.

Recruiting employees right out of college brings benefits and challenges. Historically, the firm’s leadership has grown from within. Excluding its three founders, one-third of the partners started with the organization upon graduation.

“Formally developing leadership traits in our people hadn’t been a focus until employees reached more senior levels in our career model,” explains Gillespie. “This created some circumstances of highly capable managers with limited leadership acumen or only informal leadership training up to that point.”

Recognizing that gap, the professional development team developed the Leadership Experience, an 18-month development journey. One of its most innovative features is that the application process is open to all employees at all levels. They can self-nominate by responding to a survey about leadership traits and submitting recommendation letters from two sponsors. Names are removed from the applications and turned over to a third-party firm for evaluation.

“This approach is very different from that of other firms,” Lewis says. “We didn’t want participants to be ‘tapped,’ but to put themselves forward.” Of approximately 25 applicants the first year, a dozen were selected.

The blended experience includes instructor-led training sessions, formal coaching and mentoring, e-learning, self-study, virtual training, and application-based learning projects. Elements

can flex with the needs of participants, who are expected to take responsibility for dictating the direction and to expend considerable effort in addition to their full-time client commitments. Results indicate that the initial offering was successful: 40 percent of participants were promoted after program completion.

Clarkston’s goal is for employees to participate in 80 to 100 hours of learning annually. These can include reading, self-study, on-the-job training, professional conference attendance, and many other activities in addition to formal learning events. The geographic dispersal and mobility of the workforce has inspired the learning and development team to design several offerings that can be taken up between projects or when employees have downtime. Employees seeking cross-training can work with a mentor in the target area, completing self-study projects even while they’re on assignment.

Learning is closely linked to individual and organizational performance. A core competency matrix outlines 12 competency categories and specifies successful performance expectations for each career level in the organization. The matrix is the basis for all individual performance management processes and reporting and is used during the recruitment process to identify candidates who can be successful. Employees use the matrix to outline goals and professional development plans for the upcoming year, and performance appraisal templates are mapped to the matrix.

As a billable-hour consulting organization, Clarkston keeps track of employees’

time carefully. Time spent on learning activities also is entered into the time-tracking system, which generates an individual training history report. That report, which outlines details of completed training along with overall training hours completed during the previous 12-month period, is used during the employee’s annual performance review to discuss learning activities completed and to identify professional growth opportunities for the upcoming period. Those opportunities are supported by training curriculums, which also are aligned to the competency matrix and industries that Clarkston serves.

The professional development team worked in the past year to increase the number of employees trained and to increase efficiency in its own organization. In early 2010, the firm rolled out an initiative encouraging employees to proactively seek out professional development activities to become “complete professionals”—people considered by clients to be trusted advisers.

According to Lewis, this is dependent on developing capabilities across four skill quadrants: consulting, management and leadership, industry and business expertise, and technology. Instilling a sense of responsibility to embrace learning resources and activities enabled the professional development team’s two staff members to train 183 employees in 2011, and to increase the number of employees trained per training staff member by 9 percent in the past year.

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